

COMPLETING AN ANNUAL AGENCY THRESHOLD APPLICATION

PARTNERGRANTS TRAINING

PURPOSE

The purpose of this guidance is to assist non-profit organizations through the annual Agency Threshold Application process, which takes place in the PartnerGrants grants management database system.

In order to be considered for APH funds – either through a direct award or a competitive process – is establishing an agency’s capacity to enter into a contract with Austin Public Health and the City of Austin.

If an organization demonstrates that essential non-profit organization standards are met through submission and approval of the Annual Agency Threshold Application, the agency will be notified by email.

If and when a competitive solicitation (Request for Proposals) becomes open that the agency wishes to apply for, the organization is directed to return to the PartnerGrants system to complete the Intent to Apply and the RFP process. Should this occur, please review the instructions on **Completing the RFP Proposal Guide**.

REGISTERING AS A VENDOR

All non-profit agencies need to be registered as a potential vendor with the City of Austin. The first step is to create a vendor account through the [City of Austin’s Financial Online](https://www.austintexas.gov/financeonline/finance/) system:
<https://www.austintexas.gov/financeonline/finance/>

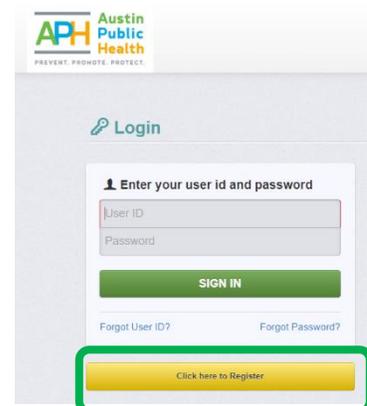
If you run into any challenges while completing the registration information, you can contact the City’s Vendor Registration office at (512) 974-2018 for assistance. Once the process has been completed, please make note of your organization’s assigned vendor code, which is required to register in PartnerGrants.

If you are unsure if your agency is already a registered vendor, you can search for the agency’s legal name or Doing Business As (DBA) through the [Registered Vendor Search](http://www.austintexas.gov/service/registered-vendor-search) website: <http://www.austintexas.gov/service/registered-vendor-search>

REGISTER IN THE PARTNERGRANTS GRANTS MANAGEMENT DATABASE

Log-in to the [PartnerGrants system website](https://PartnerGrants.austintexas.gov/index.do):
<https://PartnerGrants.austintexas.gov/index.do>

If you have not already registered in PartnerGrants, select the option to Click Here to Register and complete the required steps.



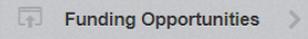
There is no limit on the number of agency staff that may be registered in PartnerGrants.

Registration is typically approved within 2 business days.

COMPLETING THE ANNUAL AGENCY THRESHOLD APPLICATION

IMPORTANT: THIS STEP MUST BE COMPLETED PRIOR TO EITHER RECEIVING A DIRECT AWARD OR APPLYING FOR ANY APH-FUNDED SOLICITATION. IT MUST BE RENEWED EVERY 12-MONTHS.

Once logged-in, from the Dashboard Menu, select **Funding Opportunities**



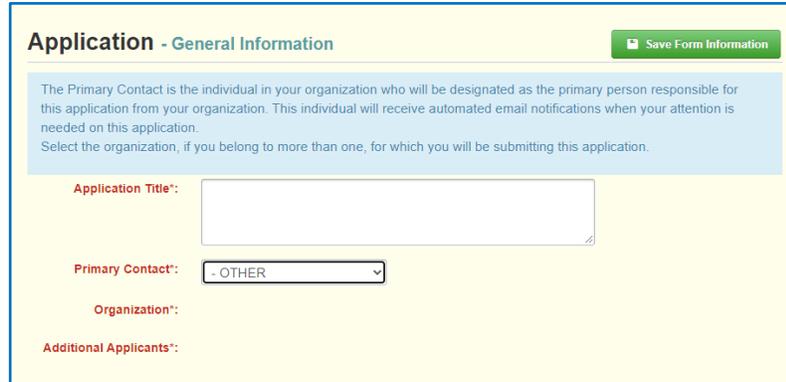
to bring up a listing of all available funding opportunities. From this listing, select the Opportunity Title Annual Agency Threshold Application – [Applicants for Funding Start Here](#).

Once you have selected the Opportunity, select **Start New Application**

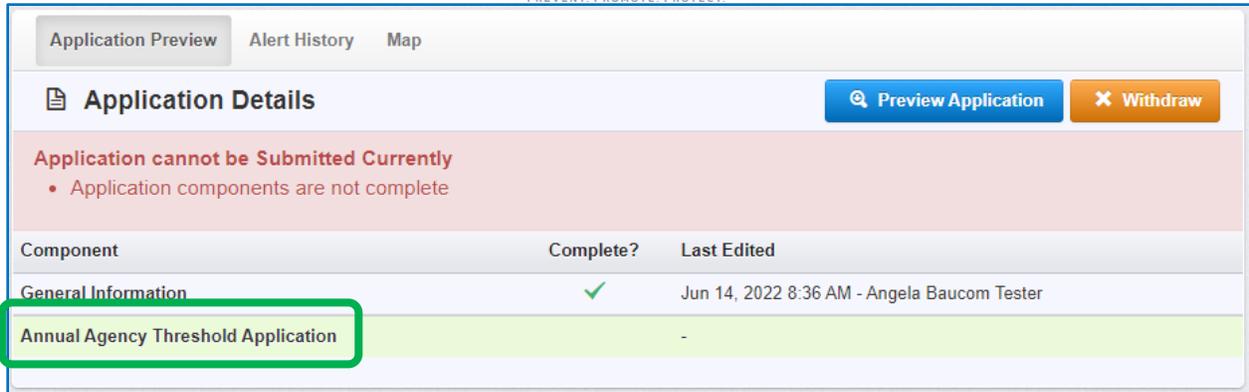


and complete the General Information form according to all posted instructions. Please title your Application “[Your Organization’s Name] – Agency Threshold Checklist – [Primary Contact’s Initials]”.

Click **Save Form Information** after each item to advance to the next field. In Additional Applicants, be sure to include additional Agency users who will need access to the Application or Proposal throughout the process.



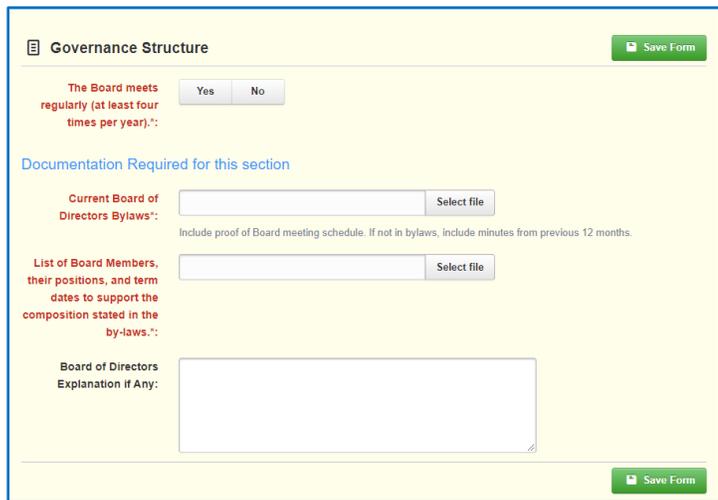
Once complete, click Save Form Information and, from the Application Details page, click **Annual Agency Threshold Application**.



The first section to complete is the Governance Structure. All information should be completed, and the required documents uploaded via the Select File buttons.

Tips:

- Note that the application asks for confirmation of your Board meeting schedule. If your Bylaws do not already include guidelines about the Board meeting schedule, please include minutes from Board meetings in the previous 12 months to support your response to these questions, or include an explanation in the field provided.
- Ensure that the list of board members includes all required information, including the term dates of each member.



Once all Governance Structure information and required documents have been uploaded, scroll down to the Agency Administration section and complete the required information – including uploading the required documents again using the Select File buttons.

Tips:

When uploading documents, title files using only letters and numbers to avoid uploading errors.

Correct: BoardBylaws2022.pdf

Incorrect: Board&Bylaws(2022).pdf

The final portion is the Agency Certification form. Carefully read through the options and select the appropriate answers, use the Select File buttons to upload relevant supporting documentation. When

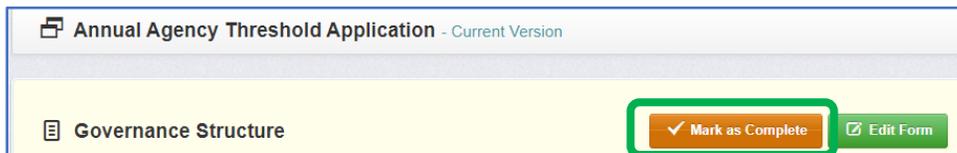
complete, scroll to the top of the screen and select the Save option, and then select **Mark as Complete** to return to the Application Forms window.

Tips:

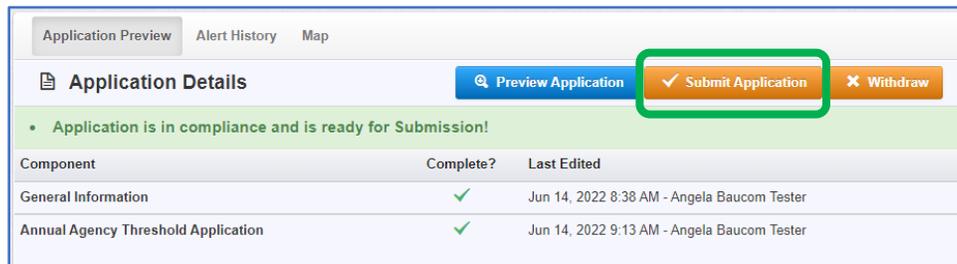
Note that the final item concerning Monitoring Reports is asking about performance and/or operations monitoring and does not refer to financial reviews or audits.

- If your Agency has received any monitoring reports reviewing program and/or operations performance reviews from a funder (including City of Austin):
 - If no findings or issues were reported and everything was satisfactory, answer “Yes” and use the Select File button to include any summary letters or reports that document the results of the monitoring report(s).
 - If any findings or issues were reported, answer “No” and use the Select File button to include any summary letters or reports that document the finding(s) or issue(s). Please also include in the Explanation field a summary of corrective actions taken.
- If your Agency has NOT received any monitoring reports reviewing program and/or operations performance reviews from a funder (including City of Austin), answer “No” and include a statement to that effect in the Explanation field.

Click Save Form at the top or bottom of the form, and click Mark as Complete when all fields and files are correct.



Once both sections have been marked as complete, click Submit Application to submit.



If you have a question, please email APHCompetitions@austintexas.gov with the subject line “Annual Agency Threshold Application – [Agency Name]”.

Only one Annual Agency Threshold Application is required per agency per 12 months. If approved, the Agency will receive notice via email.

NEXT STEPS

Depending on the number of applications being processed, it may take up to 7 business days for Austin Public Health staff to process an Annual Agency Treshold Application. Once processed, agencies will be notified by email of approval or if further clarification is needed. If approved, the submission date of the Annual Agency Threshold can then be used in submitting multiple Intents to Apply across any open APH



Social Services Funding Opportunities unless otherwise specified by the Opportunity exhibits. Please retain a record of approval that can be accessed by anyone associated with your Agency who will be submitting Applications and/or Proposals.

Important:

- Only one Annual Agency Threshold Application is required per agency per 12 months.
- An approved Annual Agency Threshold Application is valid for applying to any Austin Public Health Social Services Funding Opportunity that closes within that time period.
- The month and date of submission should be recorded and used in completing any Intent to Apply forms for solicitation Funding Opportunities.
- **Note:** If an agency is interested in applying for an open RFP, the Annual Agency Threshold Application may be pending at the time the Intent to Apply is submitted, but the Intent to Apply will not be approved until the Annual Agency Threshold Application is approved and the submission date validated by the Opportunity Program Officer.

COMPLETING THE RFP PROPOSAL

PARTNERGRANTS INSTRUCTIONS

PURPOSE

To assist a non-profit organization through the application stage for an open solicitation within the PartnerGrants system: <https://partnergrants.austintexas.gov/index.do>.

Note: If you have not reviewed or completed the Annual Agency Threshold Application, and the posted funded opportunity's Intent to Apply deadline has not yet elapsed, stop now and see the **Completing an Annual Agency Threshold Application Guide**.

QUICK INFORMATION

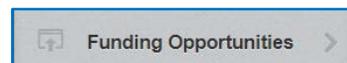
- Only organizations that complete the Annual Agency Threshold Application prior to the expiration of a posted funded opportunity's Intent to Apply deadline, are eligible for consideration to continue the application process. Your organization's Annual Agency Threshold Application status may be pending approval for you to be eligible to apply for an RFP Proposal.
- Following COA staff review of the submitted Annual Agency Threshold Application and its supporting documents, a determination will be made of an agency's capacity to enter into a contract with Austin Public Health, and the agency will be notified to move forward.
- If your organization is among those notified to return to the PartnerGrants system to complete the solicitation application, you may do so any time before the opportunity's standard application submission deadline elapses.

LOCATING A FUNDING OPPORTUNITY

If the Agency has a completed Annual Agency Threshold Application on file, the Agency may submit Intent to Apply forms to open APH Social Services Opportunities.



If not logged-in, currently open Opportunities can be viewed by clicking the **View Current Funding Opportunities** link on the PartnerGrants login page.



Once logged-in, from the Dashboard Menu, select Funding Opportunities

to bring up a listing of all available funding opportunities. From this listing you can select the posted Opportunity title that you intend to apply for. If more than one posted Opportunity is available, you are permitted to apply for each separately. Opportunities may permit you to submit multiple Applications or Proposals to the same Opportunity unless otherwise specified by the guidelines of each Opportunity allows. Refer to the official Opportunity exhibits for specific guidelines.

Tips:

Since each funded opportunity contains distinct documents, deadlines, objectives, goals, eligibility requirements, and/or evaluate criteria, each is treated independently from another.

Once you have selected the posted Opportunity Title you intend to apply for, be sure you have reviewed all Opportunity Details, to include deadlines, descriptions, website links, moderated questions and answers, and download attachments. These will be necessary to help your agency prepare its application and manage its time wisely.

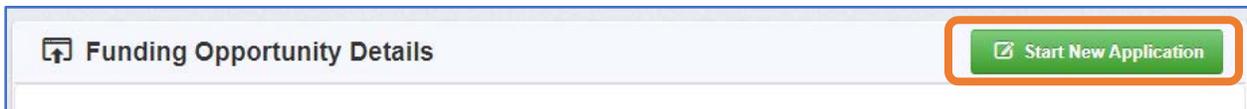


If you have a question during the Opportunity’s question submission period, you can select the Ask A Question link to submit an inquiry and then select the Save button to forward it on for a response. This link is available on the Application Details page of an active Application or Proposal. You may also submit questions via email to the Opportunity Program Officer or Designated Contact for the Opportunity.

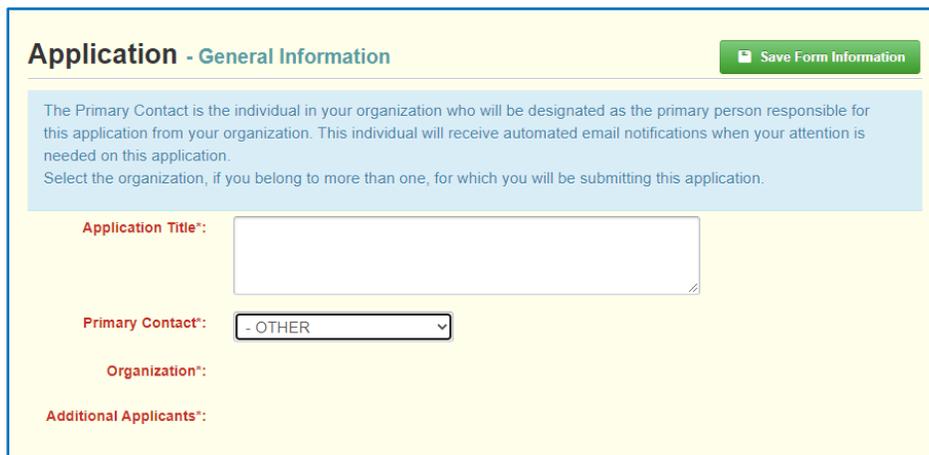
For the sake of transparency, once each question has been moderated, the question and response will be viewable for all other applicants to see. Questions asked through PartnerGrants will be answered and published on the Competition Website posted for each Opportunity. See [APH Social Services Competitions website](#) for upcoming, active and closed solicitations.

STARTING THE APPLICATION

Click the title of the desired Funding Opportunity and select the **Start a New Application** button at the top of the Funding Opportunity Details page.



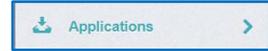
In the **General Information Form**, complete each available field, clicking Save Form Information after each item to advance to the next field.



Title the Application using a brief phrase that is specific and unique to your Agency and the program being proposed in this submission. Please do not use the solicitation title.

In **Additional Applicants**, be sure to include additional Agency users who will need access to the Application or Proposal throughout the process.

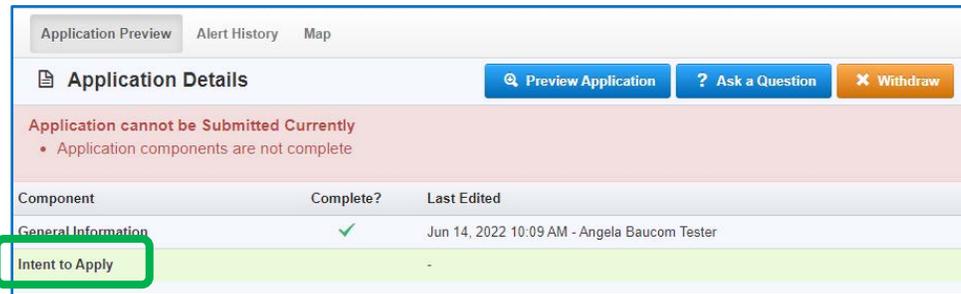
If you are returning to complete an application you have already started, it will appear in the Applications section of the PartnerGrants Menu. To continue editing, select your profile's application title.



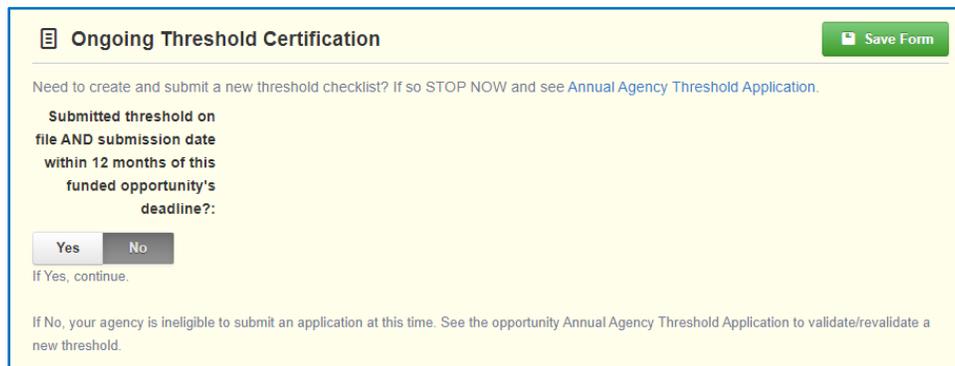
INTENT TO APPLY

In order to complete a Final Application or Proposal for a Funding Opportunity (solicitation), you must first complete an Intent to Apply form by the Intent to Apply deadline outlined in the Opportunity guidelines.

After completing the General Information, click on Intent to Apply to complete the form.



Complete the **Ongoing Threshold Certification** module by verifying that you have submitted the Annual Agency Threshold Application and that the submission date is within 12 months of the close date of the current Opportunity. If you have NOT completed this step or your submission date is not within 12 months of the close date, you will be directed to complete the Annual Agency Threshold Application prior to advancing with this application.



If you have completed the Annual Agency Threshold Application as described above, enter the Threshold submission date (only month and year needs to be accurate), and notes if any.

Submitted threshold on file AND submission date within 12 months of this funded opportunity's deadline?:

Yes No

If Yes, continue.

If No, your agency is ineligible to submit an application at this time. See the opportunity Annual Agency Threshold Application to validate/revalidate a new threshold.

Threshold Submission Date:

Enter Most Recent Threshold Submission Date. If unavailable enter 01 for day of month.

Threshold Notes, If Any:

500 character(s) left
This field limited to 500 characters.

In the **Proposal Description** section, enter a brief program title that is descriptive and specific to the program being proposed. Please do not use the full RFP title.

Enter a one or two sentence brief program description of the type of services included in the program.

If the Scope of Work for the Funding Opportunity (solicitation) includes multiple program types or service categories, identify that in the Brief Program Type section. This section may be left blank if no such categories exist within the Opportunity.

PROPOSAL DESCRIPTION

Proposed Program Title:

50 character(s) left
You must submit this form for EACH project you intend to apply for.
This field limited to 50 characters

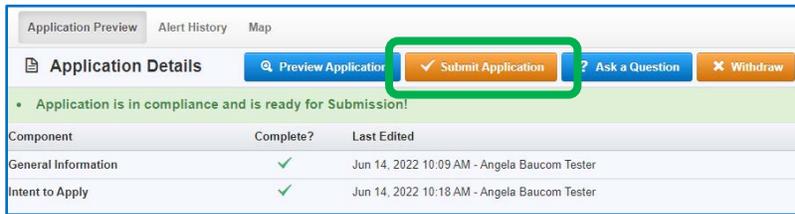
Brief Program Description:

200 character(s) left
This field limited to 200 characters

Brief Program Type:

50 character(s) left
Enter Type if Applicable
This field limited to 50 characters

Click **Save Form** and review your response. If everything is complete and correct, click **Mark as Complete** at the top of the form and then click **Submit Application**.



Once submitted, the Opportunity Program Officer will verify that the information included is valid and notify Offerors via email of next steps. If approved, Offerors will move onto the Final Application stage. You may view your current Applications from the Applications section of PartnerGrants at any time.

Important:

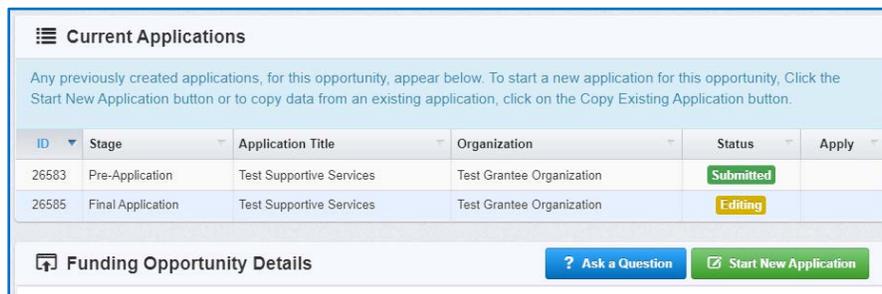
- You must complete one Intent to Apply form for each Application or Proposal you intend to submit.
- You may submit multiple Intent to Apply forms for a Funding Opportunity unless otherwise specified in the guidelines for that Opportunity.

RFP APPLICATION

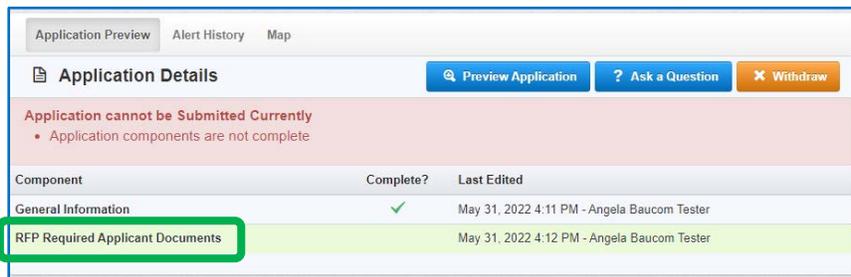
Once an Offeror is notified that an Intent to Apply has been approved, they may advance to the Final Application stage.

Be sure to review any instructions provided at the top of each form before completing a form, as it contains important information that can help complete the form.

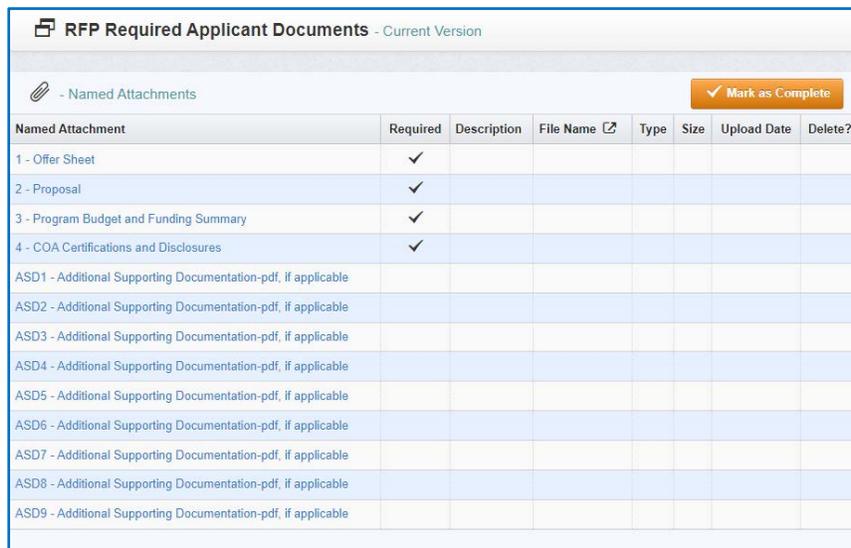
Once logged-in, from the Dashboard Menu, select Funding Opportunities  and select the title of the appropriate Funding Opportunity. Your Current Applications will appear at the top. From this section, you will see an option to Apply Final next to your Intent to Apply form. Select this option to begin a Final Application. Once started, the Final Application will appear in your Applications menu.



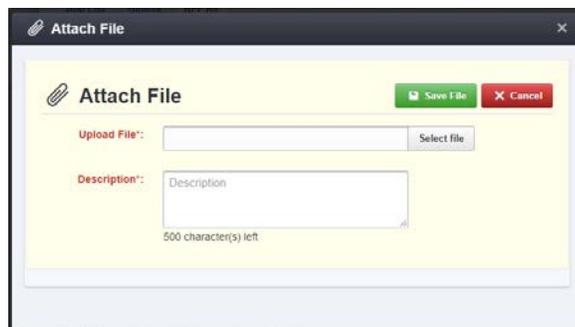
To complete the Final Application or Proposal, click the Application Title and then Edit Application at the top of the window. Click RFP Required Applicant Documents in the Application Details section.



In the **RFP Required Applicant Documents**, click on the title of each Attachment to upload the appropriate file. Ensure that you upload all of the Required Attachments listed in the Opportunity exhibits prior to submission. Title documents clearly and consolidate files to accommodate one attachment per relevant question whenever possible. As appropriate, check that files have been uploaded in the correct format per Opportunity guidelines.



Tips:
 When uploading documents, title files using only letters and numbers to avoid uploading errors.
Correct: BoardBylaws2022.pdf
Incorrect: Board&Bylaws(2022).pdf

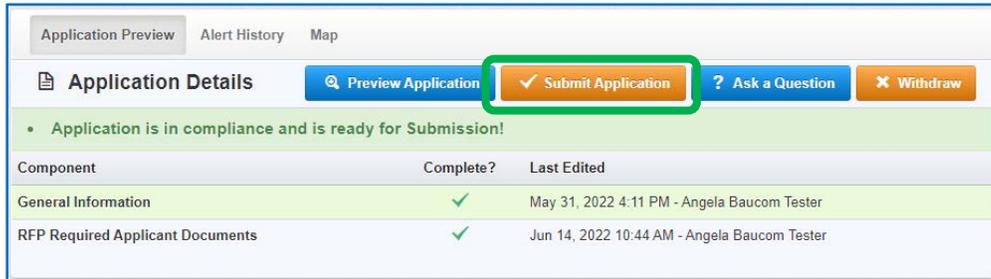


Once all files have been uploaded and checked, click Mark as Complete.

If required by the Funding Opportunity, complete any additional components within the PartnerGrants system by again clicking the title in the **Application Details** section of the Opportunity.

SUBMITTING THE APPLICATION

When all required components are complete and you are ready to submit your Final Application or Proposal, click **Submit Application**. Once submitted, you will not be able to edit, so please be sure to check all files and information prior to submitting.



Once you have successfully submitted your application, you may log out. You will receive a confirmation email from the PartnerGrants system stating that your application has moved from Editing to Submitted Status. Please retain this email for your records. If you do not receive this email, you have not successfully submitted your Application or Proposal. Please go back to the PartnerGrants system and try again.

Your application will undergo additional review, which may take several weeks or months. Your organization will be notified by email of its result.

If you have questions about any part of this process, please email APHCompetitions@austintexas.gov for assistance.